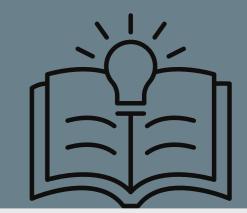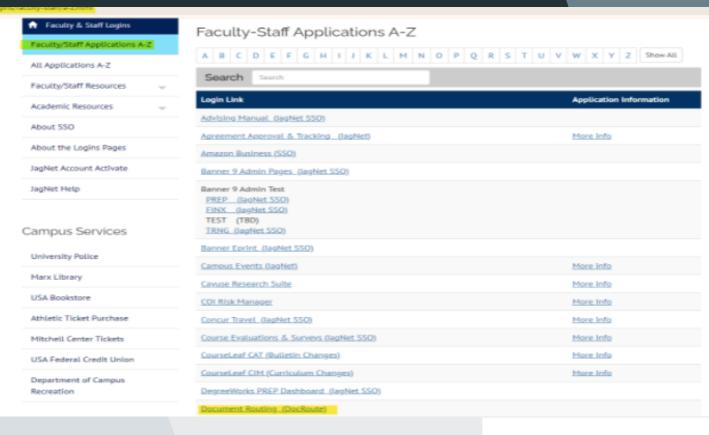DocRoute

# Banner Finance Security Form

# Instructions for using
# DocRoute Banner Finance Security Form

Navigate to Faculty and Staff Logins page of the USA Website and expand Faculty/Staff Applications A-Z at the left. Click on Document Routing (DocRoute):



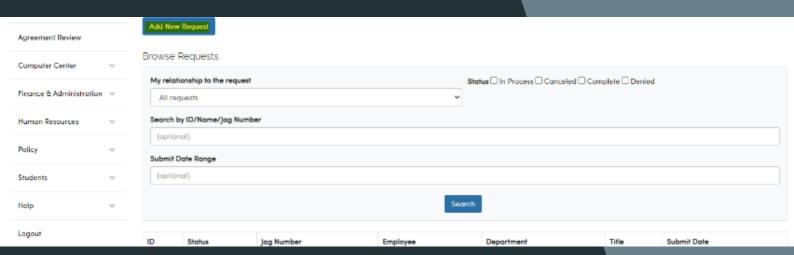At the prompt, enter your Jag Number and SSO password:

**Expand "Finance & Administration" on the left and choose "Banner Security Form." Click "Add New Request:"**

Add New Request

**Agreement Review**

**Computer Center** ⌄

**Finance & Administration** ⌄

**Human Resources** ⌄

**Policy** ⌄

**Students** ⌄

**Help** ⌄

**Logout**

Browse Requests

My relationship to the request

All requests

Status ☐ In Process ☐ Canceled ☐ Complete ☐ Denied

Search by ID/Name/Jag Number

(optional)

Submit Date Range

(optional)

Search

| ID | Status | Jag Number | Employee | Department | Title | Submit Date |
|---|---|---|---|---|---|---|

Enter a Jag Number or an email address, then click on Search. This form will allow you to request Banner Security for yourself, or on behalf of another employee. The fields in gray will prefill.

**Created By**

Jane Doe

**Create Date**

12/8/2023 10:38:58 AM

**Employee**

**Employee \***

Enter a Jag Number or email address          Search

**Jag Number**

J00123456

**Name**

Jane Doe

**Title**

Computer Systems Analyst II

**Department Code**

140210

**Department Name**

Computer Services Center

**Email**

jdoe@southalabama.edu

**Banner Account Status**

Jag number not associated with a Banner ID *(THIS APPEARS IF EMPLOYEE DOES NOT CURRENTLY HAVE A BANNER ID)*

--- OR ---

**Banner Account Status**

Enter the Department Head/Approving Supervisor's Jag Number or email address. The gray areas will prefill.
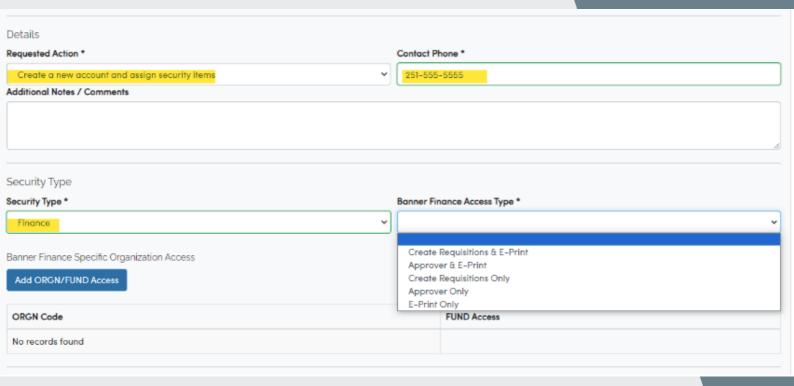
**Department Head or Approving Supervisor**

**Supervisor \***

Enter a Jag Number or email address

**Jag Number**

J00234567

**Full Name**

Sarah Smith

**Email**

sarahsmith@southalabama.edu

# Requesting
# NEW ACCESS

**Details**

**Requested Action *** 

Create a new account and assign security items ▾

**Contact Phone ***

251-555-5555

**Additional Notes / Comments**

**Security Type**

**Security Type ***

Finance ▾

**Banner Finance Access Type ***

Create Requisitions & E-Print
Approver & E-Print
Create Requisitions Only
Approver Only
E-Print Only

**Banner Finance Specific Organization Access**

Add ORGN/FUND Access

| ORGN Code | FUND Access |
|---|---|
| No records found | |

If the user is requesting new access, the only option available in the "Requested Action" drop-down is "Create a new account and assign security items." Add a phone number where you can be reached in the next field. Choose "Finance" from the drop-down for "Security Type." Choose one of the options in the "Banner Finance Access Type." This field corresponds to section 5 on the previous paper form:

**5. Type of Access:**
☐ Create Requisitions   ☐ Approver (Limit: _____ )   ☐ E-Print   ☐ Budget Query   ☐ ID-Search

Next, click on "Add ORGN/FUND Access" button to indicate which Organizations and Funds you need access to:

For each ORGN, you have three options pictured to the right. If you choose "All Grants for PI," please list the PI's name and Jag Number in the "Additional Notes/Comments" field before submitting the form.

**Add Finance ORGN/FUND Access**

**Organization Code ***

172100

**Access ***

All FUNDs for this ORGN
All Grants for P.I.
Individually List FUND codes

Finance ▾

Security Access Description is req

**Banner Finance Specific Organization Access**

Add ORGN/FUND Access

Next, choose the "Security Source." You can either request us to copy from an existing employee or describe what type of access you need in the box provided:

Security Source

Security Source *

Copied from an existing employee

User to Copy

Enter a Jag Number or email address       Search

Jag Number       Name       Title

J00345678       John Bond       Supervisor

Department Code       Department Name       Email

172100       Business Office       johnbond@southalabama.edu

----- OR -----

Security Source

Security Source *

Described below

Describe the Access You Need *

I need general Banner Finance access and also need access to run ZFGR0036 Budget Status Report.

Once you are done, read the attestation at the bottom and click on "Submit." Your request will process through the appropriate approval queues and you will be notified once your Banner Finance access has been set up.

**CHANGING YOUR EXISTING BANNER FINANCE ACCESS**:
Here is an example of someone who already has Banner Finance access, but has transferred to another department and needs access to different Organizations, Funds and reports. You can also choose the option to copy an existing user's access under "Security Source" (not pictured, see instructions in new Banner users section):

Details

Requested Action *
Change the security items on the account ▾

Contact Phone *
251-555-5555

Additional Notes / Comments
I have transferred to another department and need to change ORGN/Fund access.

Security Type

Security Type *
Finance ▾

Banner Finance Access Type *
Approver & E-Print ▾

Banner Finance Specific Organization Access

Add ORGN/FUND Access

| ORGN Code | FUND Access | |
|-----------|-------------|---|
| 420100 | All FUNDs for this ORGN | Delete |
| 420300 | 273385, 273399, 273415 | Delete |

Security Source

Security Source *
Described below ▾

Describe the Access You Need *

**Managers can also use this form to request Banner access to be removed for terminated employees:**

Details

Requested Action *
Remove all security items and lock the account ▾

Contact Phone *
251-555-5555

Additional Notes / Comments
Jane Doe's last day was 12/7/23. Please remove Banner Access.

By submitting or approving this request I understand that, I may be given access to one or more administrative computer systems. The information contained in th private and confidential nature and I acknowledge it is my responsibility to maintain the privacy of these records.

I have read the University's Information Systems Security Policy and understand all the requirements and guidelines stated therein. I understand that I am respon passwords which I have been given and that I will be held accountable for any invalid use of my user identification. I further acknowledge that my failure to follow will subject me to disciplinary action up to and including dismissal and possible legal action.

Submit

**If you have any questions or need assistance completing the form, please call the Business Office at 251-460-6241 and we will be glad to help.**